

**MIDDLESEX COUNTY RETIREMENT SYSTEM  
POSITION DESCRIPTION**

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**Position Title:** Member Services Representative

**Date:** September 10, 2018

**Reports To:** Chief Administrative Officer

**FLSA:** Non-Exempt

**Salary Range:** \$60,000 - \$70,000

**GENERAL SUMMARY**

The Member Services Representative is primarily responsible for providing counseling to and calculating all benefit types for MCRS members and beneficiaries. This position is also responsible for processing and maintaining monthly payroll for MCRS benefit recipients.

**ESSENTIAL JOB FUNCTIONS\***

- Process and calculate superannuation, termination, accidental disability, ordinary disability, accidental death, active death and involuntary retirement applications, including necessary recalculations.
- Counsel members anticipating retirement as to the various retirement types and options available to them and their post-retirement obligations.
- Provide members with creditable service estimates, benefit estimates and other retirement planning needs.
- Process monthly payroll, checks, warrants, and reports for all benefit recipients on a rotating basis, including stop payments and re-issues.
- Maintain retiree/survivor database in MCRS computer system which includes address, direct deposit, tax status, and dependent information.
- Process annual COLA payments as authorized by the Board and PERAC for eligible benefit recipients.
- Process dependent and student verifications for disability retirees.
- Assist in the preparation of all Form 1099Rs for monthly benefit recipients, including transmittal of electronic files to IRS.
- Maintain records for all DOR payments and members repaying excess earnings.
- Assist with the benefit verification process.
- Respond professionally to a variety of written, telephone, and in-person inquiries from active members, retirees, survivors, employers, other retirement system staff, etc.
- Adhere to Board policies and exhibit core competencies as established by the Board.

**OTHER DUTIES AND RESPONSIBILITIES**

- Other duties as assigned.

*The above statements are intended to describe the general nature and level of work being performed by people assigned to do this job. The above is not intended to be an exhaustive list of all responsibilities and duties required.*

\*External and internal applicants, as well as position incumbents who become disabled as defined under the Americans with Disabilities Act must be able to perform the essential job functions (as listed) either unaided or with the assistance of a reasonable accommodation to be determined by management on a case by case basis.

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## **OTHER TESTING REQUIRED**

- A Criminal Offender Record Information (CORI) query is required.

## **COMPETENCIES**

- **Action Oriented/Initiative** –Is action oriented for the tasks he/she sees as challenging; seizes opportunities; expresses opinions and initiates ideas; is engaged in the process and is proactive in helping others. Takes a task and completes it independently.
- **Quality/Accuracy/Detailed Oriented** – Continuously looks to improve the quality of processes and services; listens and responds to feedback and suggestions pertaining to quality; is precise and accurate and pays attention to details; double checks work before passing it on, and understands priorities can change and adjusts quickly.
- **Trust/Fosters a Positive Environment** – Builds a strong sense of confidence with others; values the opinions of others; acts with tact and diplomacy.
- **Member/Employer Orientation** – Develops strong trusting relationships with members; counsels members and employers on technical issues; addresses and acts on feedback and delivers results that meet the members' or employers' needs.
- **Communication/Listens to Understand/Conflict Management** – Pays full attention to what the other person is saying; is seen as approachable, confirms full understanding before responding; addresses conflict in an open and trusting manner; avoids assessing blame, and communicates clearly and effectively in writing and in-person.
- **Teamwork** – Works cooperatively with others, makes efforts to include others in the team; encourages all to participate in discussion, contributes to achieve a common objective; makes decisions that benefit the team and assists others when needed.
- **Integrity/Ethics and Values** – Earns others' trust and respect through consistent honesty and professionalism in all interactions.

## **PREPARATION, KNOWLEDGE, SKILLS & ABILITIES**

- Bachelor's Degree in related field or equivalent work experience required.
- At least three years working with a retirement system or finance department required.
- Ability to follow instructions and function independently within prescribed deadlines.
- Strong verbal and written communication skills.
- Good working knowledge of computers, including Microsoft Office.
- Previous experience with Massachusetts General Laws Chapter 32 preferred.
- Ability to use PTG software preferred.

## **WORKING CONDITIONS/PHYSICAL DEMANDS**

- Sit for long periods of time.
- Use hands to finger, handle or feel, or to talk or hear.
- Frequently reach with hand and arms, and stand and walk.

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- Occasionally lift and/or move up to 10 pounds.
- Specific vision abilities required by this job include close vision and ability to adjust and focus.

## **SUBMISSION REQUIREMENTS**

To apply for this position, please submit a cover letter and resume to Lisa Maloney, Esq., Chief Administrative Officer, Middlesex County Retirement System, P.O. Box 160, Billerica, MA 01865, **by 2:00 p.m., Friday, September 28, 2018.**

### **840 CMR 1.03: Prohibition Against Certain Persons Holding Certain Positions**

No individual who has been convicted of robbery, bribery, extortion, embezzlement, fraud, grand larceny, burglary, arson, a felony violation of state or federal law defined in Section 102(a) of the Comprehensive Drug Abuse Prevention and Control Act of 1970, murder, rape, kidnapping, perjury, assault with intent to kill, any crime described in Section 9(a)(1) of the Investment Company Act of 1940 (15 U.S.C. 80a-9(a)(1)), a violation of Section 302 of the Labor-Management Relations Act, 1947 (29 U.S.C. 186), a violation of Chapter 63 of Title 18, United States Code, a violation of Section 874, 1027, 1503, 1505, 1506, 1510, 1951, or 1954 of Title 18 United States Code, a violation of the Labor-Management Reporting and Disclosure Act of 1959 (29 U.S.C. 401), any felony involving abuse or misuse of such person's position or employment in a labor organization or employee benefit plan to seek or obtain an illegal gain at the expense of the members of the labor organization or the beneficiaries of the employee benefit plan, or conspiracy to commit any such crimes, or a crime in which any of the foregoing is an element or has been found by the Commission or any court to have violated his/her fiduciary duty or has been found by the Ethics Commission or any court to have violated M.G.L. c. 268A, shall serve or be permitted to serve:

- (1) As a member, administrator, fiduciary, officer, trustee, custodian, counsel, agent, employee or representative in any capacity of a board.
- (2) As a consultant, manager or provider of goods or services to a board.
- (3) In any capacity that involves decision making authority or custody or control of the monies, funds, assets or property of any system.

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